IDOT iCX Help Files

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Welcome

Welcome to the Illinois Department of Transportation (IDOT) **integrated Contractor's Exchange (iCX)** Help Menu.

The **integrated Contractor's Exchange (iCX)** is a web-based application for bid preparation and bid submission. Bidders for an Illinois Department of Transportation (IDOT or the Department) contract may use this program to prepare and submit their bid electronically (ebid).

The iCX application is only accessible through the IDOT Vendor Portal (https://webappsqa.dot.illinois.gov/VendorPortal/) by clicking on the "iCX" link in the left column.
Information about the Vendor Portal may be found here: http://www.idot.illinois.gov/Assets/uploads/files/Doing-Business/Manuals-Guides-&-Handbooks/Highways/IDOT%20VP%20User%20Guide%202.1.pdf

With iCX you can:

Contractor Profile

- Display company information
- Manage and display disclosures concerning individual or company financial information and conflicts of interest (Form A)
- Manage and display disclosures concerning company contracts and procurement information (Form B)

Bidding

- Manage the bid submission process
- Display and input of contract pay items
- Import and Export pay item prices with estimating software
- Enter procurement certification information

- [Upload a Document](#)
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- [Enter bid bond information](#)
- [Submit Bid](#)
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- [Review the bid submission history](#)
- [Print Submitted Bid or Bid Draft Information](#)

Dashboard

Overview

The dashboard displays a list of recently accessed contracts with some key contract information and allows users to navigate directly to these contracts.

Window Description

The Dashboard is a table of information about recently accessed contracts and includes the item number, the contract number, the contract description, and the status of the bid (submitted or not submitted).

Notes:

- A user may navigate to the bidding page of a contract by clicking on the contract number.
- Items are removed from the dashboard page 7 days after the bid letting.

iCX Help Contacts

For questions or problems, please call ExeVision's toll-free number (866-304-2844) and select option #9.

The IDOT support menu provides 2 options.

#1— IDOT Vendor Portal Support for business questions. This option will transfer you to the IDOT contracts office at 217-782-7806.

#2 — iCXweb (Integrated Contractors Exchange) support for questions or problems with the iCXweb application.
- During IDOT's normal business hours (8am-5pm) M-F, ExeVision iCXweb support calls are routed directly to iCXweb support personnel who will provide immediate responses to users' questions. In the unlikely event that all personnel are unavailable, the caller will leave a voicemail in the support mailbox.
    - During non-bidding weeks, these calls will be returned within two business hours.
    - During bidding weeks, these calls will be returned within two hours.
- Outside of IDOT's normal business hours
    - During non-bidding weeks, the caller may leave a voicemail in the support mailbox and calls will be returned within two business hours
    - During bidding week, the call will be answered by a calling service and will be returned within two hours.

System Requirements

The iCX application has been tested to run on the following browsers:

- Internet Explorer 9 and higher

Save As You Go

While editing a bid or project, iCX can be set up to save your work "as you go". There are two ways that this setting can be changed:

- Click "Options" in the iCX login bar at the top right of the screen. Choose "Save As You Go".
- When you click to a new page without saving new work on an existing page, a window will display asking if you would like to save your work before continuing. At the bottom of this window is a check box to enable "Save As You Go". Click the checkbox.

Profile Overview

The Profile contains information about the bidding contractor— information that is automatically included with each bid submission. The profile includes basic contact information for the contractor as well as the required financial disclosure information as represented in the financial disclosure (Form A or 10k Report) and financial-related information (Form B). Financial disclosures include the 10K Report, Form A and Form B. For publicly traded companies, the 10k Report and the Form B are required. For non-publicly traded companies, the Form A and the Form B are required. All financial disclosures must be completed or uploaded, as well as accurate and up-to-date, prior to bid submission.   At the time of bid submission, the information recorded in the profile windows will attach to the bid.

The profile also identifies the company under which the bid will be submitted. In cases where a single user may bid for multiple companies (i.e. joint venture) the contractor profile indicates the company for which the authorized user is acting.

The Profile Menu is composed of the following windows:

- Company Information Window - Displays information about the company and its employees such as contact information, employees authorized to submit bids, etc.
- Financial Disclosure Form A Window - Financial information regarding company ownership
- Financial Disclosure Form B Window - Financial information regarding current company contracts
- 10K Report Upload Window – Financial information required for publicly traded companies

Company Information

Company Information Window

Profile -> Company Information

Overview

The Company Information window displays the current company information that will be submitted with each bid, the employees of the submitting company, and their access rights.

Window Description

The Company Information Window displays the company contact information on the top part of the window and a table of the company's employees and their access rights in the bottom portion of the window. The company and employee information is "read-only" and is received from the IDOT Vendor Portal. For information regarding the Vendor Portal, please access: http://www.idot.illinois.gov/Assets/uploads/files/Doing-Business/Manuals-Guides-&-Handbooks/Highways/IDOTVPUSERGUIDE.pdf.

Notes:

- Employees that are assigned the role of "USER" are able to complete the Bid Proposal, but are not allowed to submit the bid.
- Employees that are assigned the role of "ADMINISTRATOR" are able to complete the bid proposal and are allowed to submit the bid. If an "ADMINISTRATOR" does not have signature authority on file with IDOT and said "ADMINISTRATOR" submits a bid, the bid **will be rejected** by the Department.

Financial Disclosure Form A

Financial Disclosure Form A Window

Profile -> Financial Form A

Overview

The Financial Disclosure Form A Window is used to collect the financial information for companies submitting bids for IDOT projects as required by Illinois statute. Information in the Financial Disclosure Form A Window is entered once and then submitted with each bid. Information in Form A only needs to be edited if there are changes to the required information.

Window Description

The Financial Disclosure Form A window includes a list of the company's Financial Disclosure Forms A in the left column and the text and data fields to complete the Financial Disclosure Form A on the right of the window.

Window Functionality

- [Add a Financial Disclosure Form A](#)
- [Complete or update a Financial Disclosure Form A](#)
- [Delete a Financial Disclosure Form A](#)

Notes:

- The Form A names in the tree structure on the left, change from a **_red, bold, and italic_** appearance to a normal, black appearance when all the certification information in that Form A is complete.

Add a Financial Disclosure Form A

Overview

The ability to add a Financial Disclosure Form A is in the [Financial Disclosure Form A Window](#).

Prerequisites

- None

Add a Financial Disclosure Form A

To add a Financial Disclosure Form A:

- Click on the Add Form A button, located near the top of the screen, about half way between the right edge and the middle, near where the save button is.

Notes

- A new Form A requires that the Name and Address fields be complete before it will save.

Complete or Update a Financial Disclosure Form A

Overview

The ability to complete or update a Financial Disclosure Form A is in the [Financial Disclosure Form A Window](#).

Prerequisites

The [Form A must be added](#) or the [10K Report uploaded](#).

Complete or Update a Financial Disclosure Form A

To complete or update a Financial Disclosure Form A:

- Enter a value, select a radio button, or enter text in each visible field on the form.

Notes

- The Form A is complete when the Name in the left column is displayed in normal, black text. The Name will be displayed in red, bold, italic text until the Form A is complete.

Delete a Financial Disclosure Form A

Overview

The ability to delete a Financial Disclosure Form A is in the [Financial Disclosure Form A Window](#).

Prerequisites

The [Form A must be added](#).

Delete a Financial Disclosure Form A

To delete a Financial Disclosure Form A:

- Click on the desired Form A in the left column.
- Click the "Delete Form A" button, located next to the "Add Form A" button, (this will launch a confirmation message).
- Click "Yes" in the confirmation message.

Financial Disclosure Form B

Financial Disclosure Form B Window

Profile -> Form B

Overview

The Financial Disclosure Form B window is used to collect the disclosure information for companies submitting bids for IDOT projects as required by Illinois statute. Information in the Financial Disclosure Form B window may be entered once, and is then submitted with every bid. Information in Form B only needs to be edited if there are changes to the relevant Form B information for the company.

Window Description

The Financial Disclosure Form B window includes a list of the company's Financial Forms B in the left column and the text and data fields to complete the Form B on the right of the window.

Window Functionality

The functionality in the Financial Disclosure Form B is:

- Add a Financial Disclosure Form B
- Complete or update a Financial Disclosure Form B
- Delete a Financial Disclosure Form B

Notes:

- The Financial Disclosure Form B names in the tree structure on the left change from *red, bold and italic* font to normal, black font when all the certification information in the node is complete.

Add a Financial Disclosure Form B

Overview

The ability to add a Financial Disclosure Form B is in the [Financial Disclosure Form B Window.](#)

Prerequisites

- Must have at least one Form B.

Add a Financial Disclosure Form B

To add a Financial Disclosure Form B:

- Click on the "Add Form B" button, located near the top of the screen, about half way between the right edge and the middle, near where the save button is.

Notes

- A new Form B requires that the "Name" field be complete before it will save.

Complete or Update a Financial Disclosure Form B

Overview

The ability to complete or update a Financial Disclosure Form B is in the [Financial Disclosure Form B Window](#).

Prerequisites

The [Financial Disclosure Form B must be added](#).

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Complete or Update a Financial Disclosure Form B

To complete or update a Financial Disclosure Form B:

- Enter a value, select a radio button or enter text in each visible field on the form.

- The Form B is complete when the Name in the left column is displayed in normal black text. The Name will be displayed in red, bold, and italic text until the Form B is complete.
- In most cases, only one Financial Disclosure Form B is required with the bid submission. When submitting a bid as a joint venture, one Form B must be filled out for each company that is part of the joint venture.

Delete a Financial Disclosure Form B

Overview

The ability to delete a Financial Disclosure Form B is in the [Financial Disclosure Form B Window](#).

Prerequisites

The [Financial Disclosure Form B must be added.](#)

Delete a Financial Disclosure Form B

To delete a Financial Disclosure Form B:

- Click on the desired Financial Disclosure Form B in the left column.
- Click the "Delete a Financial Disclosure Form B" button, located next to the "Add a Financial Disclosure Form B" button (this will launch a confirmation message).
- Click "Yes" in the confirmation message.

10K Report

10K Report Window

Profile -> 10K Report

Overview

The 10K Report window is used to upload the 10K Report for companies that choose this method to disclose the relevant financial information. Information in the 10K Report window may be uploaded once, and is then submitted with every bid. Information in the

10K Report only needs to be changed if there are changes to the 10K Report for the company.

Window Description

The 10K Report window includes an upload table for the company's 10K Report

Window Functionality

The functionality in the 10K Report is:

- [Upload a 10K Report](#)

Notes:

- Financial information may equivalently be entered using the [Financial Disclosure Form A Window](#).

Upload a 10K Report

Overview

The ability to upload a 10K Report is in the [10K Report Window.](#)

Prerequisites

- Must have a Form A completed or a 10K Report uploaded in order to submit.

Upload a 10K Report

To upload a 10K Report:

- Click on the "File Upload" button under the table (this will launch the Upload pop-up)
- Click the "Select" button (this will launch a Windows Explorer window)
- Navigate to the 10K Report
- Click on the 10K Report
- Click on the "Open" button (this will close the Windows Explorer window)
- Click the "Continue" button

Bidding

Bidding Overview - How to Submit a Bid

The process of submitting a bid involves:

1) Securing the appropriate authorizations to bid on a contract.
2) Completing the required information (prices, certifications, etc.) in the construction contract proposal.
3) Providing the bid guaranty information.
4) Submitting the completed bid information.

The following steps outline the process:

1. Receive Authorization to Bid on a contract (*see* 44 Illinois Administrative Code 650, Subpart B)- If your company does not have authority to bid on a contract, the contract will not appear in the "Select Contract" drop-down menu in the Bidding Window. Contact IDOT to receive authorization: http://www.idot.illinois.gov/doing-business/procurements/construction-services/construction-bulletins/transportation-bulletin/index
2. Select a Contract - See #1 above if desired contract does not display in this window.
3. Enter Pay Item Prices.

or

3. You may export the pay item prices, use 3rd Party software to create the pay item prices, and Import the pay item prices when completed.
4. Acknowledge Addenda (if applicable) - Any changes to the contract through addenda will be automatically added to the contract in iCX. The contractor will be notified by a pop-up window that the contract has had an addendum added to it. In addition, if the addendum modifies the quantity of items in the contract, the prices for these items will be reset to $0.00 to identify the quantities that have changed.
5. Enter Certifications Information - All certifications that are in the contract will need to be completed to submit a bid.
6. Enter Bid Guaranty Information (if applicable) - The contractor must input a number for an electronic bid bond or send a check or paper bid bond to the Department.
7. View the Bid Draft - Review a report of the bid draft
8. Submit Bid - Submit the bid to the Secure*Vault*
9. Print Submitted Bid or Bid Draft Information - Create a paper copy of the bid submission
10. Withdraw Bid - Withdraw a submitted bid, if desired.

When a bid has been submitted, the iCX system:

- Stores the bid in the Secure*Vault* until IDOT initiates the transfer of the bid item data for the bid opening.
- Maintains a copy of the bid by the contractor for dispute resolution purposes.

Bidding Window

Bidding Window

Bidding -> Bidding

Overview

The Bidding window manages all of the bidding information associated with a specific contract, including pay item prices, certifications, addenda, bid submission, etc.

Window Description

The Bidding Window includes a header at the top of the window, a tree structure of bidding information along the lower left side of the window and an area for entering and editing bid data on the lower right side of the window.

Window Header

The Bidding window header includes the Select Contract field, the Contract Number, Location, Description, Funding Type, and Bid Open Date, Contract Type, and a link to the contract's plans and specifications.

Functionality

The functionality in the Bidding Header is:

- Select a Contract

Notes:

- Contracts are only available in the "Select Contract" field after the users company has been authorized to bid on the contract

Contract Tree Structure

The contract tree structure in the left column provides access to the data entry windows needed to complete a bid. The tree structure shows the Contract Number as the top node. If the top node (the contract number), is selected, then the Bid Submission Window is displayed. If the plus icon (+) next to the Items, Addenda, and Certifications nodes is clicked, that menu is expanded to show a menu of links for that node. When any of the links are clicked the right side of the window displays the Pay Items, Addenda, or Certifications window.

Functionality

The contract tree structure allows the user to access the Items, Addenda and Certifications windows. In the tree structure a user may also:

- Export Pay Item Prices
- Import Pay Item Prices

Notes:

- The nodes in the tree structure change from red, bold and italic font to normal, black font when the information in the node is complete. This change occurs for Items, Addenda, and Certifications.

Bid Data Entry

The main portion of the screen shows the Bid Submission, Pay Items, Addenda, and Certifications windows when a link in the tree structure is selected.

Select a Contract

Overview

The ability to select a contract is available in the Bidding Window. Before a user may review, modify or add information to a contract, the user must select the desired contract.

Prerequisites

The user must be authorized to bid on at least one contract. Authorization to bid is granted through IDOT's Prequalification Section and the Contracts Office.

Select a Contract

To select a contract

- Click in the "Select Date" field
- Select the desired bid open date or on "All Dates"
- Click in the "Select Contract" field.
- (optional) Type the initial characters of the contract in the menu. (The list of contracts in the drop-down will be filtered based on the characters entered).
- Click on the desired contract in the drop-down menu. (The scroll bar on the right can be used to show additional contracts).

Notes

- The "Intelligent Search" technology used in the "Select Contract" field searches the following fields for the entered string:
  - Contract Number
  - Item Number
  - Description
  - Location
- If more than 300 entries match the entered string, no contracts will display in the drop-down. The user must increase the length of the string or be more specific.

Export Pay Item Prices

Overview

The ability to export pay item prices is available in the [Bidding Window](#) and the [Contract Bulletin Window](#). A user may export the pay items to a spreadsheet format which may then be edited in spreadsheet software (e.g. Microsoft Excel) or third party estimation software (e.g. Bid2Win, HCSS, or Hard Dollar). The Department neither requires no endorses any third party estimation software.

Prerequisites

None

Export Pay Item Prices

To export pay item prices

- Right-click on "Pay Items" text in the tree structure (this will launch a context sensitive menu).
- Click on "Export Items" (this will launch the Export Items pop-up window).
- Select the desired file format.
- Click the "Export" button.

Import Pay Item Prices

Overview

The ability to import pay item prices is available in the [Bidding Window](#).

Prerequisites

A user must have [exported the pay items](#) previously.

Import Pay Item Prices

To import pay item Prices:

- Right-click on "Pay Items" text in the tree structure (this will launch a context sensitive menu).
- Click on "Import Items" (this will launch the Upload File dialog box).
- Click on the "Choose File" button.
- Navigate to the desired file and click on it.
- Click the "Open" button.
- Click the "Continue" button.

Notes:

- Pay item with prices already entered will be overwritten, unless the item has a price of $0.00 price in the spreadsheet file. Prices of $0.00 in the spreadsheet file do <u>not</u> overwrite prices entered in iCX
- The Import functionality requires the data be in a specific format in the spreadsheet. Users should not modify the columns (move, delete, etc.) in the exported file if it will be imported into iCX again.
- The import functionality will import any items in the spreadsheet that can be matched to items in iCX. Spreadsheet items that can't be matched to items in iCX will be ignored. (Note: Items added manually in third-party software (i.e HCSS, Bid2Win, or HardDollar) will not be imported into iCX)

Pay Items

Pay Items Window

Bidding -> Bidding -> Pay Items Node

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Overview

The Pay Items Window is in the lower right portion of the [Bidding Window](#), and receives and displays the contractors pay item prices on a contract.

Window Description

The Pay Items Window is a table of the pay items in a contract, with relevant information about each pay item including item description, units of measure (UOM), quantity, unit price and extended price. In most cases, the bidder is required to provide a price for the pay items, but there are situations where a pay item will have a fixed price and the user will enter the quantity, or both the quantity and price are fixed.

Functionality

The functionality available in the Items Window includes:

- Enter Pay Item Prices
- Sort Pay Items
- Show Pay Items with a $0.00 price
- Alternates
- Additives

-

Notes:

- At least one pay item must have a non-zero price to be considered complete, to be able to submit a bid
- The base, alternate, and additive group names, and the "Pay Items" node in the tree structure, change from red, bold and italic text to normal, black text when non-zero prices have been entered for all the pay items in the group or contract.
- If an addendum modifies the quantity of a pay item in the contract, the price for this pay item will be reset to $0.00, and the user will have to enter the pay item price.

Enter Pay Item Prices

Overview

The ability to enter pay item prices on a contract is available in the [Pay Items Window](#).

Prerequisites

The user must be authorized to bid on the contract.

Enter Pay Item Prices

To enter pay item prices:

- Select the current price in the Unit Price column by highlighting or double-clicking.
- Enter in the desired price.

Notes

- A user may use the tab key to move the cursor to the next Unit Price field. Using the tab to navigate automatically highlights the price in the new cell.
- When the price for one pay item has been entered for the base items or alternate items, and the price for one pay item has been added in each additive, the name of that group of items will change from red, bold, and italics text to black, normal text.
- **Alternates** - The iCX application handles contracts with alternates.
- Contracts with alternates will show the items that compose the alternates under a separate category in the item tree on the left of the window. This example, show a contract with alternates labeled "ALT A" and "ALT B" where the items in "ALT B" are completed, and no prices have been entered for "ALT A".
- **Additives** - The iCX application handles contracts with additives.
- Contracts with additives will show the items that compose the additives under a separate category in the item tree on the left of the window. This example, shows a contract with additives labeled "Alt 1", "Alt 2" and "Alt 3". In this example the items in "Alt 1" are completed, and no prices have been entered in the other additives.

- A non-$0.00 price must be entered for at least one item in each additive before the bid may be submitted.

Sort Items

Overview

The ability to sort items on a contract is available in the [Pay Items Window](#).

Prerequisites

The user must be authorized to bid on the contract.

Sort Items

To sort items:

- Click on the name of the column you wish to sort by.

Notes

- Items may only be sorted by Item Number, Description, and Unit of Measure (UOM).

Show Incomplete Items Only

Overview

The ability to show items with a $0.00 price is available in the [Pay Items Window](#).

Prerequisites

The user must be authorized to bid on the contract.

Show Incomplete Items Only

To show only the incomplete items:

- Check the "Show Only Incomplete Items" box located in the bottom left corner of the Items Window.

Notes

- When the user unchecks the "Show Only Incomplete Items" box, all items will show once again.

Addenda

Addenda Window

Bidding -> Bidding -> Addenda Node

Overview

The Addenda Window manages all the information about addenda that have been created for the contract, including links to the web pages and acknowledgements. Addenda can be issued for any change to the original advertised contract. If the addendum is for a pay item change, the pay items will be automatically updated in the iCX.

Window Description

The Addenda Window is a table of the addenda on a contract, with the addendum number, date, description, addenda URL (web site link), and acknowledgement. The bidder is required to acknowledge all addenda before the bid may be submitted.

Functionality

The functionality available in the Items Window includes:

- [Acknowledge Addenda](#)
- [View Addenda Information](#)

-

Notes:

- If there are no addenda for the contract, then no addenda will need to be acknowledged and the "Addenda" node in the tee structure will show the addenda as complete by being in black, normal font.
- A user may click on the icon in the "URL" column to launch the IDOT webpage with the detailed addenda information.
- All addenda must be acknowledged before the bid may be submitted.
- If an addendum is released after a bid has been submitted, the bid must be resubmitted or it <u>MAY BE</u> declared non-responsive.
- Pay item changes may include any or all of the following:
  - If a new pay item is added, it will be added to the list of pay items.
  - If an existing item is deleted, it will be deleted from the list of pay items.
  - If the quantity of a pay item is changed, the quantity will be updated, the price is reset to $0.00, and the user must enter a new price.

Acknowledge Addenda

Overview

A user must acknowledge all addenda on a project in the [Addenda Window](#) before a bid may be submitted.

Prerequisites

The user must be authorized to bid on the contract.

Acknowledge Addenda

To acknowledge addenda:

- Click on the checkbox in the "Acknowledge" column for the desired addendum.
- Click the "Save" button.

Notes

- If there are no addenda for the contract, then no addenda will need to be acknowledged and the "Addenda" node in the tree structure will show the addenda as complete by being in a black, normal font.
- A user may click on the icon in the "URL" column to launch the IDOT webpage with the detailed addendum information.

View Addenda Information

Overview

The ability to view detailed addenda information is available in the [Addenda Window](#).

Prerequisites

The user must be authorized to bid on the contract

View Addenda Information

To view detailed addenda information

- Click on the icon in the "URL" column for the desired addendum (this will launch the IDOT webpage with the detailed addendum information)
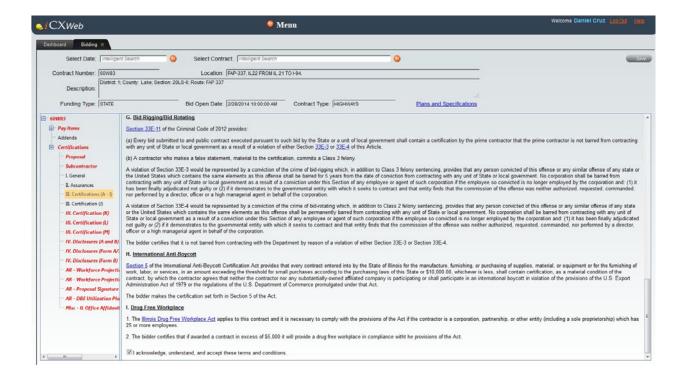
Certifications

Certifications Window

Bidding -> Bidding -> Certifications Node

Overview

The Certifications Window is in the lower right portion of the [Bidding Window](#), displays the certification language, and receives the responses of the contractors.

Window Description

The Certifications Window shows the certification text and contractor's response for the certification selected in the tree view on the left of the window. The bidder is required to provide a response to each certification before submitting a bid.

Notes:

- All visible elements (checkboxes, text fields, radio buttons, etc.) in the certifications window must have a response to be complete.
- The individual certification names and the "Certifications" node in the tree structure change from red, bold and italic text to normal, black text when all the certification information in the node is complete.
- All certifications showing under the "Certifications" node in the tree structure must be complete before a bid may be submitted.

Enter Certifications Information

Overview

The ability to enter certification information is available in the Certifications Window.

Prerequisites

The user must be authorized to bid on the contract.

Enter Certifications Information

To enter certifications information, provide the information required.

- For checkboxes, click in the checkbox.
- For radio buttons, click on the radio button next to the correct response.
- For text fields, enter text.
- For file up-loads:
  - Click the "File Upload" button
  - Click the "Choose File" button
  - Navigate to the desired file
  - Click on the desired file
  - Click the "Open" button
  - Click the "Continue" button

Notes

- When the information for a certification is complete, the name of that certification will change from red, bold, and italics to black, normal text.
- In the Form A certification, if the user selects the option that says, "Under penalty of perjury, I have determined that no individuals associated with this organization meet the criteria that would require the completion of a Form A." The Form A information that is submitted with the bid will indicate that the Form A is not applicable.

Upload a Document

Overview

The ability to upload a document is available in some of the certifications available from the [Certifications Window](#).

Prerequisites

The user must be authorized to bid on the contract.

Upload a Document

To complete some certifications a user is required to upload a document. Certifications that require an uploaded document have a document upload window. To upload a document:

- Click "File Upload" (this will launch the Upload File Dialog Box)
- Click the "Select" button (this will launch a Windows Explorer window)
- Navigate to the file that needs to be uploaded
- Double-click on the file or click on the file then the "Open button" (this will close the Windows Explorer window)
- Click on the "Continue" button in the Upload File Dialog Box

Notes

- When present in the Certifications List on the [Certifications Window](#), the following certifications may require a file upload
  - III. Certification J (depends on the response to the certification)
  - AR - Proposal Signature Sheet (Joint Ventures Only)
  - AR - DBE Utilization Plan and Good Faith Effort
  - Misc - IL Office Affidavit
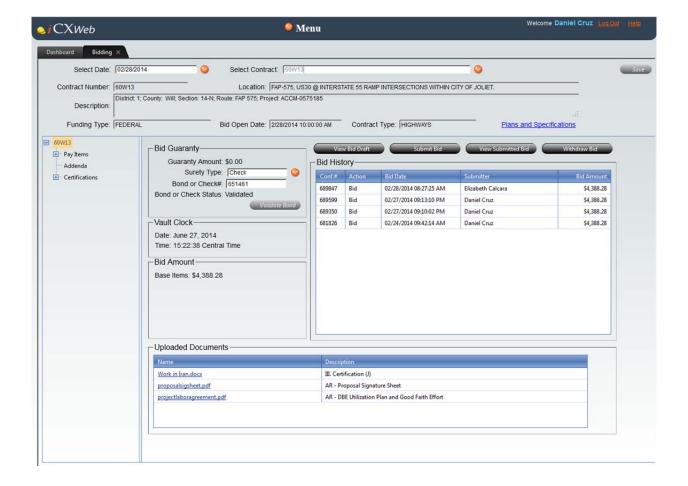 - Misc - Project Labor Agreement SP

Bid Submission

Bid Submission Window

Bidding -> Bidding -> Contract Node

Overview

The Bid Submission Window is in the lower right portion of the [Bidding Window](#) and displays the information, status and history of the bid submission for the selected contract.

Window Description

The Bid Submission Window shows Bid Guaranty information, the Vault Clock time, the total bid amount, the bid history, and provides the ability to submit, withdraw, or view and print the submitted bid. The Department recommends printing the final submitted bid for your records.

Functionality

The functionality available in the Items Window includes:

- Enter and Validate Bid Guaranty Information
- Electronic Bid Bonds
- View the Bid Draft
- Submit a Bid
- Submit a Combination Bid
- View a Submitted Bid
- Withdraw Bid
- Print Bid or Bid Draft Information

- [Review the Bid Submission History](#)
- [Review the Uploaded Documents](#)

Notes

- The "Combination Bid Total" field only appears for one of the contracts that is being let in combination

Enter and Validate Bid Guaranty Information

Overview

The ability to enter bid guaranty information and validate an electronic bid bond is available in the [Bid Submission Window](#).

Prerequisites

The user must be authorized to bid on the contract.
The "Bond or Check Status" cannot say "Not Required"

Enter and Validate Bid Guaranty Information

Bidders may provide their bid surety with an electronic bid bond, mailed bid bond, or a check. A check or mailed bid bond must be mailed in to the Department before the date and time of bid opening. See contact information below:

For electronic bid bonds, the bidder must:

- Receive an electronic bid bond from [Surety2000](#) or [SurePath (InSure Vision Technologies).](#)
- Select the company issuing the electronic bid bond in the "Surety Type" dropdown.
- Enter the bid bond number in the "Bond or Check#" field.
- Click the "Validate Bond".

For checks and mailed bid bonds, the bidder must:

- Write the check and deliver it to IDOT at:
    IDOT
    2300 South Dirksen Parkway
    Springfield, IL 62764
    Room 326
- Select "Check" or "Mailed Bid Bond" in the "Surety Type" dropdown.
- Enter the check number in the "Bond or Check#" field.

Notes

- A validated bid bond, mailed bid bond, or guaranty check number must be included before a bid may be submitted.
- Guaranty checks and mailed bid bonds must be received by IDOT prior to the bid opening date and time identified in the Invitation for Bid.
  - Mail to:
    IDOT
    2300 South Dirksen Parkway
    Springfield, IL 62764
    Room 326
- Small Business Initiative (SBI) and Target Market Program (TMP) contracts do not require any bid guaranty.

Electronic Bid Bonds

Overview

When submitting a bid, if using an electronic bid bond, a contractor must include either a check or a bid bond that has been registered with an electronic bid bond clearing house.

Prerequisites

The user must be authorized to bid on the contract
The "Bond or Check Status" can not say "Not Required"

Electronic Bid Bonds

Surety companies may provide bidders with an electronic bid bond or a check. For electronic bid bonds, the bidder must receive an electronic bid bond from Surety2000 or SurePath (InSure Vision Technologies). Contractors that have annual bid bonds through Surety2000 may use them as they would any other electronic bid bond.

The contact information for the electronic clearing houses that can be used with iCX are shown below:
Surety2000
- Contact: Lisa Clemens, Vice President
- Website: www.surety2000.com
- E-mail: help@surety2000.com
- Phone: 800-660-3263

SurePath (InSure Vision Technologies)

- Website: www.insurevision.com
- Email: support@insurevision.com
- Phone: 818-783-3460

View a Submitted Bid

Overview

The ability to view a report of the currently submitted bid is available in the Bid Submission Window. The Department recommends printing the final submitted bid for your records.

Prerequisites

The user must be authorized to bid on the contract.
The user must have already Submitted a Bid

View a Submitted Bid

A user may view a report of the currently submitted bid by:

- Clicking the "View Submitted Bid" button

Notes

- The Submitted Bid consists of the information that composes the current bid submitted by the contractor. To see the information about the currently bid draft see the View the Bid Draft help file.
- The Bid Draft and the Submitted Bid information will be the same if the user has not changed anything since submitting the bid.

View the Bid Draft

Overview

The ability to view the current draft bid information is available in the Bid Submission Window.

Prerequisites

The user must be authorized to bid on the contract.

View the Bid Draft

A user may view the current draft bid information by:

- Clicking the "View Bid Draft" button

Notes

- The Bid Draft consists of the information currently entered by the contractor. To see the information about the currently submitted bid see the View a Submitted Bid help file.
- The Bid Draft and the Submitted Bid information will be the same if the user has not changed anything since submitting the bid.

Print Submitted Bid or Bid Draft Information

Overview

The ability to print a paper version of the bid draft or the submitted bid is available in the Bid Submission Window. The Department recommends printing the final submitted bid for your records.

Prerequisites

The user must be authorized to bid on the contract.

Print Submitted Bid or Bid Draft Information

A user may print a paper version of the bid draft or the submitted bid by:

- Viewing a Submitted Bid or Viewing the Bid Draft (this will launch a new tab with the report)
- Clicking the "Print PDF" icon or the Microsoft Word icon

Submit a Combination Bid

Overview

The ability to submit a combination bid is available in the Bid Submission Window.

Prerequisites

The user must be authorized to bid on the contract, and the contract must be let in combination with another contract as determined by IDOT.

Submit Bid

To submit a combination bid:

- Add a price in the "Combination Bid Total" field.
-

Notes

- The "Combination Bid Total" field only appears for one of the contracts that is being let in combination as determined by IDOT.

Submit Bid

Overview

The ability to submit a bid is available in the [Bid Submission Window](#).

Prerequisites

The user must be an ADMINISTRATOR for a contractor and must be on file at IDOT as having Signature Authority.

Submit Bid

To submit a bid:

- Click on the "Submit Bid" button
- This will launch a warning message with the text "You must be on file at IDOT as having Signature Authority for your Company. To confirm your status, please call IDOT at 217-782-3413."
- Click "OK"

Notes

- The ability to submit a bid is only available to users with an "ADMINISTRATOR" access as shown on the Company Info Window.

- The "ADMINISTRATOR" submitting the bid must be on file (IDOT Form BC-8) at IDOT as having Signature Authority.
- The follow verifications are performed before allowing a bid to be submitted:
    - At least one of the base items must have a non-zero price.
    - If the contract includes alternates, at least one item in the alternates must have a non-zero price.
    - If the contract includes additives, each additive must have at least one item with a non-zero price.
    - All certifications must be completed.
    - All addenda must be acknowledged.
    - If the response to certification "**IV. Disclosures (Form A/10K Report)**" indicates that one or more Financial Disclosure Form A's are required, all the Financial Disclosure Form As must be completed. If the certification indicates the 10K Report is required, the 10K report must be uploaded.
    - A Financial Disclosure Form B must be completed for every company involved in the bid. In most cases, only one Financial Disclosure Form B is required. For joint ventures, a Financial Disclosure Form B must be completed for each company.
    - If the surety type is SurePath or Surety 2000, then the bond number must have been validated.
    - If the surety type is a check or mailed bid bond, then the check or bid bond number must be entered.
- Bids <u>cannot</u> be submitted after the time of bid opening.
- Bids cannot currently be submitted using the Google Chrome or Mozilla Firefox browsers.

Withdraw Bid

Overview

The ability to withdraw a bid is available in the [Bid Submission Window](#).

Prerequisites

The user must be authorized to bid on the contract.

Submit Bid

To withdraw a bid:

- Click on the "Withdraw Bid" button.

Notes

- If the last "submission" before the bid opening time is a withdrawn bid, IDOT **WILL NOT RECEIVE** any bid information for the contractor. However, the *Secure*Vault will retain all bid submissions for audit purposes.

Review the Bid Submission History

Overview

The ability to review the bid submission history is available in the [Bid Submission Window](#).

Prerequisites

The user must be authorized as an [AGENT](#) to bid on the contract.

Submit Bid

A user may review the history of bid submissions and withdrawals for the user's contract in the Bid History table.

Review the Uploaded Documents

Overview

The ability to review the uploaded documents is available in the [Bid Submission Window](#).

Prerequisites

The user must be authorized to bid on the contract.

Submit Bid

A user may review all the documents that were uploaded for the selected contract in the Uploaded Documents table.
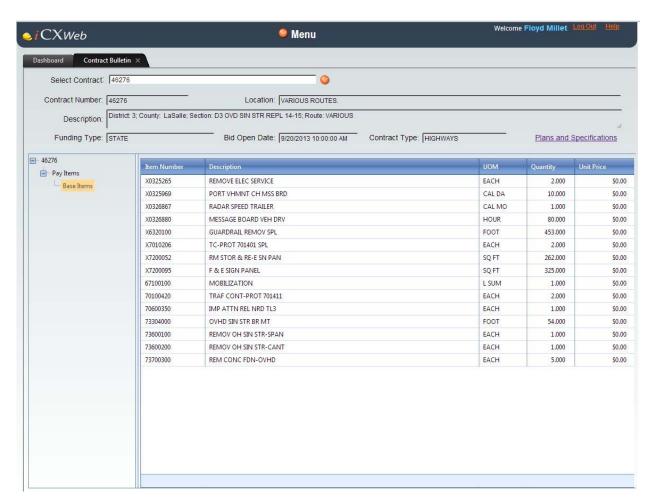
Contract Bulletin

Contract Bulletin Window

Bidding -> Contract Bulletin

Overview

The Contract Bulletin window allows contractors to view and export bid items for contracts on upcoming bid lettings.

Window Description

The Contract Window includes a header at the top of the window and a tree structure of the pay items along the lower left side of the window. When a group of pay items is selected in the left column the items in the group are displayed in the lower right side of the window.

Window Header

The Bidding window header includes the Select Contract field, the Contract Number, Location, Description, Funding Type, and Bid Open Date, Contract Type, and a link to the contract's plans and specifications.

Functionality

The functionality in the Bidding Header is:

- [Export Pay Item Prices](#)

Notes:

- The list of pay items are available for export for all future bid lettings.